



Your Guide to Legacy Gifts

Thank you for considering a legacy gift for Bridgepoint Health.

Your legacy gift is a special way to ensure that future Bridgepoint patients can benefit from compassionate care and specialized rehabilitation. It's also a practical decision that allows you to balance your financial circumstances with your charitable goals.

Professional advice will give you peace of mind

Seek the advice of a financial advisor, lawyer or accredited estate planner when considering a legacy gift. They have the expertise to help you balance your financial circumstances and your charitable goals.

If you have questions, we're happy to help

You can reach a Foundation representative by contacting

Malcolm Coles
Manager, Advancement Services
Bridgepoint Health Foundation
416-461-8252 ext. 2057
mcoles@bridgepointhealth.ca

Your questions will be kept confidential, and no commitment is required.

Types of Legacy Gifts:

Charitable Bequests

The most common way to make a legacy gift is to name Bridgepoint Health Foundation in your will. You may choose to leave a specific sum of money to Bridgepoint Health Foundation, or a percentage of your estate. Or you may decide to leave a gift of property or securities. Please work with your estate planner, lawyer or financial advisor to ensure your bequest suits your situation and is legally valid.

Life insurance

You can take out a new life insurance policy with Bridgepoint as the beneficiary, or transfer the ownership of an existing policy to Bridgepoint. Both options will offer you tax benefits.

Retirement Plans (RRSPs, RRIFs)

Your estate can benefit from considerable tax savings if you designate Bridgepoint Health Foundation as a beneficiary of your RRSP or RRIF. A charitable tax receipt will be issued to the estate for the value of the assets received from the plan.

Charitable Gift annuities

You can give a sum of money to Bridgepoint and receive an annual percentage of the amount for the rest of your life, and you may also be eligible for an immediate charitable tax receipt.

Charitable Remainder Trust

This ensures that you can continue to receive a steady income with the knowledge that a future gift is in place. All, or a portion of, the remaining assets are distributed to Bridgepoint Health Foundation at the termination of the trust. Assets such as cash, securities and real estate can be placed in the trust.

Gift of Residual Interest

You may wish to consider this if you are leaving your home or other property to Bridgepoint Health Foundation in your will. A gift of residual interest, such as a residence, permits you to retain the right to use the property for life or for a specified term, and may be eligible for immediate tax benefits.

About Bridgepoint Health Foundation

Bridgepoint Health Foundation works to support Bridgepoint Health's vision through charitable giving and community partnerships. We are located at 14 St. Matthews Road, Toronto, ON, M4M 2B5.

Incorporated in 1990, Bridgepoint Health Foundation is a registered Canadian charity (Charitable Registration No. 88923 4399 RR0001). The Foundation has adopted Imagine Canada's Ethical Fundraising and Financial Accountability Code.

